

19P05020R0002
Pre-Proposal Conference
September 3, 2020 at 9:30 am
Health Insurance Coverage for Locally Employed Staff and their Eligible Dependents
U.S. Embassy Lisbon

Participants

Embassy Staff:

Todd Bate-Poxon, Human Resources & Financial Manager Officer

Carmo Mariano, Human Resources Assistant

Adelia Monteiro, Procurement Supervisor

José Gregório, Procurement Assistant

Prospective quoters participating in the conference:

Allianz – (incumbent)

Filipe Rodrigues

Ageas Group:

Mafalda Filipa Figueiredo Gomes

Nuno Henrique Madeira Nunes Duarte

Ana Cristina Pedroso

AGCS Agência Central de Seguros

Patricia Frazão

ABREVIATIONS AND ACRONYMS:

CO – Contracting Officer

COR – Contracting Officer Representative

HR – Human Resources Officer

HRA – Human Resources Assistant

PS – Procurement Supervisor

PA – Procurement Assistant

FAR – Federal Acquisition Regulation

DOSAR – Department of State Acquisition Regulation

A/OPE – Office of the Procurement Executive

SOW – Statement of Work

USG – United States Government

The meeting was called to order at 9:30 am at the Manor House of U.S. Embassy Lisbon.

All participating in the meeting introduced themselves. The meeting was conducted by Ms. Adelia Monteiro, Procurement Supervisor (PS).

PS explained the complexity of some solicitations and how Federal Acquisition Regulation (FAR) and Department of State Acquisition Regulation (DOSAR) apply to the solicitation process. She also referred the role of the Office of Procurement Executive (AOPE), as the umbrella organization that oversees all the Department of State contracting activities.

PS referred that solicitation is published on the Embassy website and also on Beta.sam.gov site giving it a wider visibility to U.S. and overseas prospective offerors. Participants in the meeting were reminded that Questions and Answers (Q&As) will also be made public through those channels. Adelia Monteiro (PS), explained that questions will not be answered individually to each prospective offeror, but answers will be compiled and posted at the Embassy website and in Beta.sam.gov site.

The Procurement Supervisor reminded everyone of the importance of filling out form SF33 correctly. She also referred to Section B (Price), starting on page 2 of the solicitation that needs to be filled out as well. If there are any questions related to this matter, they should be addressed to the U.S. Embassy Procurement Section by email to lisbonprocure@state.gov

Ms. Carmo Mariano will be the Contracting Officer Representative (COR) for this contract.

PS explained that some contract clauses are cited by reference, others are in full text. All U.S. Department of State contracting activity is regulated by the Federal Acquisition Regulation (FAR) and by the Department of State Acquisition Regulation (DOSAR).

PS explained that an amendment to solicitation will be issued to correct the following items:

- C.1.1.9 – Hearing Aids – Hearing Aid Apparatus: Limited to one apparatus per ear up the maximum amount per covered individual per three-year period is €1,275.00.
- C.1.1.15 – HIV/AIDS - Reimbursement at a minimum in US dollars (\$10,000.00) per year where it should be in Euros (€8,500.00) per year.
- Section J - Exhibit F- Claims Payout for the Past Three Years. The total amounts were corrected both in Euros and U.S. Dollars were corrected.

PS referred to Sections G – Contract Administration, and Section H. She also pointed out to the participants that SAM.gov registration is mandatory for all contracts above \$30,000.00. SAM.gov web site contains various hyperlinks to help pages and to explanatory videos. SAM.gov entails acquiring a DUNS and NCAGE number prior to registration.

PS indicated that this will be 1 (one) base year plus 4 (four) option years contract. The USG has the unilateral right to exercise the option years of the contract.

PS referred to the Trafficking in Humans Clause, a subject that is taken very seriously by the U.S. Department of State (FAR 52.222-56) in Section L.

PS called attention to clause Section K- Representations, Certifications, and Other Statements of Offerors, paragraph K13-52.229-11 Tax on Certain Foreign Procurements – Notice and Representation and gave a brief explanation of the Zadroga Act. This clause applies to contracts

above \$250,000.00. Portugal has a taxation agreement with the United States for America therefore, the winning contractor will be subject to an exemption. However, offeror must respond to the questions in the clause and submit Form W-14 with the proposal. Offerors were advised you go to the site and fill out the form and verify the instructions www.irs.gov/w14.

In addition, the PS referred to solicitation paragraph K12 51.204.24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment a new released FAR provision and explained that the United States of America Government recently enacted Section 889(a)(1)(A) and (B) of the John S. McCain National Defense Authorization Act for Fiscal Year 2019 which prohibits U.S. Government entities, including the Embassy of the United States in Lisbon, Portugal, from procuring or obtaining, or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system. This prohibition applies to the use of covered telecommunications equipment or services, regardless of whether that use is in performance of work under a Federal contract. The covered companies are listed in the FAR 52.204-25.

Each offeror, current contractor, or proposed contractor must complete FAR clauses 52.204-24 and read in its entirety 52.204-25. In the event that an offeror uses covered telecommunications equipment or services, additional actions are required.

For those companies that are already registered in SAM.gov platform they need to update their registration.

Section L – Instructions, Conditions and Notices to the Offerors. PS indicated that from the contracting side is the same as all previous contracts for medical insurance. The only thing to note is that the levels are minimum standards. The Embassy is moving to a standard plan with minimum standards – proposals that meet or exceed those minimum levels will be acceptable

proposals. Further stated that the Embassy is very much looking forward to receiving off-the-shelf proposals, especially if some categories provide higher level of coverage.

Section M – Evaluation Factors for Award. The PS explain in detail how proposals are evaluated by a Technical Evaluation Panel (TEP) which analyses all proposals without its price references. The outcome of TEP follows to both the CO and the Procurement Section for Price Analyses before a final decision is reached for subsequent award. The winning proposal is the one that is considered technically acceptable and lowest price. The USG has the prerogative of going back to the offerors and negotiate offers or simply award based on the initial proposals.

Carmo Mariano (COR) addressed the meeting by explaining the key points in the Statement of Work (SOW), but first, she reiterated that the GMC benefits are set at a minimum base line, and that vendors can propose a higher level of coverage. It means that coverage levels that are less than 100% can end up being higher in the actual plan, depending on what is available in the local insurance market.

The COR explained in detail *C.1.2 Annual Maximum Limit* (page 10) by stating that the maximum annual reimbursement per each person enrolled in the plan, per contract year is 40,000.00 Euros, not including expenses defined under Exclusions and Limitations (C.1.3) and Catastrophic Coverage (C.1.1.16) or those covered under HIV/AIDS (C.1.1.15). The COR also explained that the HIV/AIDS clause in C.1.1.15 cannot be excluded or omitted from the quotation and that is a mandatory clause of the Plan.

As far as the current exclusions are concerned, the COR stated that exclusions to coverage in the present solicitation may be amended if the bidder providers such coverage in an off the self plan and provided that the proposals are at the lowest-cost and technically acceptable, also indicating that any change to the exclusions would have to be authorized by the HR bureau in Washington.

The COR also referred that most of the coverages have no caps, and that the exceptions were for hearing aids, optical and dental categories. As far as orthodontia treatments are concerned, she mentioned that coverage requires that treatments begin before age 18 or if required due to an accident. The maximum coverage, per coverage individual is up to 4 years, with contract lifetime cap.

The COR continued by saying that an eligible dependent child will be covered until the end of the contract year in which he or she reaches age 26. Exception will be made to unmarried children over age 26, who are unable to support themselves due to physical or mental health conditions.

The COR specified that updates with new eligible participants in the insurance plan will be provided to the Insurance Company, as well as updates on cancellations. The premium payments will be made in advance and on a quarterly basis. Adjustments to premiums paid due to enrollments or cancellations of participants will be offset with the premium payment of the following quarter. She also explained that each quarter the Embassy issues a Task Order (Requisição), which includes an updated list of participants, a list organized by employees, dependents, and by Agency (as each agency has its own funds), and a spreadsheet listing the adjustments to a previous quarter.

The COR called the attention to the fact that the contractor must provide a written document in Portuguese (brochure/pamphlet/electronic copy of the policy) that shows a complete list of the health insurance benefits to be offered un the contract. That copy shall be provided to the COR within 15 days from the date of award of the contract.

The COR concluded by saying that proposals for inside and outside of the network of service providers could be offered if part of the local insurance market.

PS Reminded that Questions should be forwarded by email until September 8 at 16:00. Todd Bate-Poxon (HR) reiterated that more complex questions may take more time to be answered, some may eventually be answered either by Legal or HROE office in Washington DC.

The PS thanked everyone for their presence at the meeting.

The meeting was adjourned at 10.30 and attendees were escorted out of the Embassy.